(833) 978-2838
Refund@TaxManMultiservices.com
www.taxmanmultiservices.com
3050 Post Oak Blvd. STE 510
Houston, TX 77056

PARTNERSHIP OVERVIEW

TaxMan Multiservices
Strategic Partnerships

Helping businesses provide more value to the people they already serve.

WHO WE ARE

TaxMan Multiservices helps individuals, entrepreneurs and small business owners navigate tax preparation and financial decisions through a convenient, technology-driven process.

WHY TAXMAN

We combine professional tax preparation with education and year-round support so clients understand what they are filing and how to prepare better going forward.

- Professional Tax Preparation
- Secure Online Client Portal
- Entrepreneur & Small Business Focus
- Convenient Virtual Service
- Year-Round Tax Support

WHY PARTNERSHIPS WORK

You already have trusted relationships. Together, we add relevant education and a direct path to tax support, helping your organization deliver more value without significant additional work.

WHAT TAXMAN HANDLES

We handle presentations, educational resources, tax questions, private client follow-up and individual tax services. You help choose the format, share approved materials and introduce interested people.

NEXT STEP: Choose a workshop, resource share or referral relationship.

Schedule a 15-Minute Partnership Conversation

taxmanmultiservices.com/partnerships

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CONTRACTORS / CONSTRUCTION COMPANIES

Contractor Financial Support Partnership

Help your contractor network build stronger tax habits.

Give contractors access to practical tax support that reduces confusion around self-employment and recordkeeping. Position your company as a valuable business resource for its network.

WHO THIS PARTNERSHIP HELPS

Independent contractors, subcontractors, construction business owners and self-employed tradespeople in your network.

WHAT TAXMAN PROVIDES

- Contractor Tax Readiness workshop; optional quarterly estimated-tax readiness topic.
- Tax preparation for self-employed clients, including Schedule C.
- Year-end tax planning and a practical tax organization checklist.
- Bookkeeping consultation and a clear path to individual tax support.

WHAT THE PARTNER PROVIDES

- Introduce TaxMan to interested contractors and subcontractors.
- Promote a workshop through crew meetings, email or your network.
- Share approved educational materials and make warm introductions.

HOW IT WORKS

1. **Connect**
   Agree on audience, format and referral terms.
2. **Educate & introduce**
   Share useful education and make warm introductions.
3. **TaxMan serves**
   We onboard clients and deliver qualifying paid services.
4. **Recognize & grow**
   We verify referrals, pay agreed incentives and plan next steps.

REFERRAL THANK-YOU

$100 per standard qualifying referral; up to $150 for higher-value entrepreneur/business referrals.

New clients must identify the partner, complete qualifying paid services and satisfy agreed referral terms.

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BARBERSHOPS / SALONS

Beauty & Barber Business Partnership

Support the business behind every chair.

Help barbers and stylists become better-organized business owners while positioning your shop or salon as a resource that supports their success beyond the chair.

WHO THIS PARTNERSHIP HELPS

Barbers, stylists, booth renters, salon suite owners and independent beauty professionals, including those growing a side business.

WHAT TAXMAN PROVIDES

- Tax Tips for Barbers & Stylists workshop tailored to self-employment.
- Education on tracking service income, tips and business expenses.
- Schedule C tax preparation and year-end tax planning.
- Bookkeeping consultation and simple tax organization resources.

WHAT THE PARTNER PROVIDES

- Introduce TaxMan to interested professionals in your shop or suites.
- Coordinate a convenient education session and promote attendance.
- Share approved resources and refer professionals seeking tax help.

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DAYCARES / AFTERSCHOOL PROGRAMS

Family Financial Wellness Partnership

Give the families you serve a trusted tax resource.

Give parents practical tax education during tax season while strengthening your program as a trusted resource for working families. TaxMan handles private tax matters directly with each family.

WHO THIS PARTNERSHIP HELPS

Working parents, caregivers and program staff, including families with gig income, self-employment or a small business.

WHAT TAXMAN PROVIDES

- Family tax readiness session; optional staff session.
- Education on income and childcare expense records, including side income and self-employment.
- Professional tax preparation and review of potential credits based on each family's situation.
- Private follow-up and individual tax support directly with families.

WHAT THE PARTNER PROVIDES

- Share approved resources through parent newsletters or family events.
- Help coordinate and promote an optional education session.
- Connect interested families with TaxMan for private follow-up.

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APARTMENT COMMUNITIES / PROPERTY MANAGERS

Resident Financial Wellness Partnership

A financial wellness amenity for your residents.

Add a practical financial wellness event to your resident-engagement calendar without creating another program for staff to manage. TaxMan leads the session and handles individual follow-up.

WHO THIS PARTNERSHIP HELPS

Working households, gig workers, self-employed residents and small business owners living in your community.

WHAT TAXMAN PROVIDES

- Presentation and educational materials for a resident tax readiness event.
- Resident questions and guidance on tax documents and side-income records.
- Private follow-up directly with interested residents.
- Individual tax services for households and self-employed residents.

WHAT THE PARTNER PROVIDES

- Provide or approve a space or virtual format.
- Promote the event through approved resident channels.
- Introduce TaxMan to interested residents; direct private tax questions to our team.

HOW IT WORKS

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2 Educate & introduce
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INSURANCE AGENTS / AGENCIES

Strategic Insurance Referral Partnership

Mutual Client Referral Opportunity

Connect clients with complementary professional support. Your agency can introduce tax, bookkeeping and tax-planning needs to TaxMan; we can introduce appropriate insurance needs to your agency.

WHO THIS PARTNERSHIP HELPS

Insurance clients who are entrepreneurs, small business owners, self-employed professionals or working families seeking tax support.

WHAT TAXMAN PROVIDES

- Tax preparation and year-end tax planning for referred clients.
- Bookkeeping consultation for entrepreneurs and business owners.
- Joint educational sessions and approved tax readiness resources.
- With client permission, introductions to your agency when an appropriate insurance need arises.

WHAT THE PARTNER PROVIDES

- Identify tax, bookkeeping or tax-planning needs and introduce interested clients to TaxMan.
- Make warm introductions with the client's permission.
- Collaborate on education and share approved resources with clients.

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WORKING TOGETHER

Partnership Guidelines

A clear, practical foundation for a productive relationship.

Referral qualification

A qualifying referral is a new TaxMan client who identifies the partner, completes qualifying paid services and satisfies the agreed referral terms. $100 per standard qualifying referral; up to $150 for higher-value entrepreneur/business referrals.

Referral tracking

Ask clients to name your organization during intake. TaxMan records the referral source and verifies eligibility before confirming an incentive.

Incentive payment timing

Payment follows completion of qualifying services, collection of the client fee and referral verification. The payment schedule and method are agreed during partnership setup.

Client privacy

Make introductions with client permission. Clients send tax documents directly through TaxMan's secure process. Partner updates are limited to permitted referral information, not private tax details.

Partner responsibilities

Share approved materials, support agreed event logistics and introduce interested clients. Do not provide tax advice on TaxMan's behalf or promise tax outcomes.

TaxMan responsibilities & service fit

TaxMan handles education, onboarding and service delivery, and communicates directly with referred clients about tax matters. TaxMan determines whether each client qualifies for its services.

Non-exclusivity

The relationship is non-exclusive unless otherwise agreed. Referrals are based on client needs and fit; neither party is required to make a referral.

Final partnership terms may be documented separately based on the nature of the relationship.

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